

UG1 MicroStrategy Reporting & Performance Subgroup Meeting Minutes

Date: January 31, 2014
Time: 9:30 AM to 11:00 AM
Location: WebEx
Next Meeting Date: February 14, 2014

Meeting Agenda

- ☐ MicroStrategy Performance
 - Status of ETRs/Upcoming Performance Enhancements
 - MicroStrategy Performance Metrics
 - Open Discussion
- ☐ MicroStrategy Reporting
 - Discussion: National Average on Scorecard
 - Discussion: Mail Preparer vs. eDoc Submitter
 - Discussion: Historical Data Retention Recommendations

Meeting Minutes

Announcements:

- Next meeting Feb 28th has been changed to March 7 & then March 14

Discussions:

MicroStrategy Performance Metrics

- Who is looking at quality of reports?
 - Concerns from AT&T
- What is working correctly? When will it be scheduled for fix or repair?
- Request to Share when known issues are targeted to be resolved
- If you have a metric, issue you can go to trend report to analyze day to day
- Scorecard only shows average so more difficult to analyze

Discussion: National Average on Scorecard

- Allows users to compare metrics
- Thresholds defined don't apply to mail owner scorecard
- Could look at national average page to compare
- Click on button on side of scorecard to view threshold, instead of showing threshold it will show national average
- For mail owner scorecard, there are no thresholds at the moment
- Present in separate screen
 - On same screen as threshold?
 - See national average as % or numeric metric? Needs to be %
- One Option:
 - On threshold screen, show: Threshold, national average %, mailer %, & total % if different locations
- **Question:**
 - Do we highlight if mailer is above the national average? Or highlight if over threshold?
- **Answer:**
 - Highlight over threshold
- Add national average to a separate screen
 - For eDoc submitters it would be on the threshold screen
 - Also add total % value for mailer on this screen
- Export Option
 - National average as a column in the export

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- Row for each metric in the entire scorecard
- Column for each CRID that a mail owner
- National average would only display where there are %

Discussion: Mail Preparer vs. eDoc Submitter

- USPS asking how many people are using eDoc Submitter reports and is it necessary?
- Felt they needed to represent the corporate office in mail.dat file
- Need to figure out why Mail preparer reports are separate from eDoc Submitter?
- If USPS eliminated Mail Preparer reports, 1/3 of customers would not mind
- eDoc view displays all information across different programs
- There is a need to have division of reporting
 - Ex-drop ship or multiple layers of service providers
 - Need discussion as to who can see what
- TABLE DISCUSSION TO NEXT MEETING SO MAILERS CAN GO IN & LOOK AT THE 2 DIFFERENT VIEWS: Mail Owner vs. eDoc Submitter
 - Randy will take a look & we will place on agenda for March 7
- Is role of mail preparer still useful? Maybe have view split by Mail Owner vs. eDoc Submitter rather than Mail Preparer vs. eDoc Submitter

Discussion: Historical Data Retention Recommendations

- Summary data available for 12 months, after 6 months data is archived
- If need archived data, could get it within 10 days of request
- Concern: 10 days is a long time to retrieve data. 5 business days is more reasonable.
- Requirement:
 - if don't have errors, maintain documentation for 90 days
 - If have errors, maintain for 1 year
- Manifest is piece-level data
- USPS is looking at request for data download
- Once get the data, allows vendors to help customers produce
- Anticipating existing processes will stay the same
- Questions about Pub 401 & legal inspection needs
- Ex) If Pub 401 goes away in the future, what are the legality of requirements that USPS will hold mailer accountable for
- USPS came up with current DMM, pub 401. Question is what is the replacement, what are you going to need?
- Financial data is stored for 4 years
- MicroStrategy Reporting aggregate data will be available in the standard reports for 13 months
- MicroStrategy Reporting detailed data will be available in the drill downs for 13 months
- Helpful to have a clear understanding of what type of data is being held for how long
- Recommend to bring this topic to PostalOne Users group
- USPS is looking at exporting larger blocks of data- keep this discussion going
- Get larger amounts of data to analyze a particular data

Discussion: Usability of the Mail Owner Reports

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- Make an agenda item for next meeting

Action Items

Action Item	Owner	Due Date
Randy R. will look into the different views: Mail Owner vs. eDoc Submitter	Randy Randal	3/7/14
Linda G. will bring Historical Data Retention changes topic to Postal One Users Group meeting next week or week after.	Linda Gustason/Jackie Engleman	2/24/14
Beth B. will identify the anomalies in the seamless reports and present them in MTAC 143.	Beth Bigalow	3/7/14